

2-1-1 VIRGINIA/STATEWIDE INFORMATION & REFERRAL TELEPHONE ETIQUETTE

The purpose of these guidelines is to assist 2-1-1 VIRGINIA specialists in answering the telephone, setting up voicemail greetings and auto attendant features, and the use of hold and transfer functions. Staff should be able to provide the caller with information from the 2-1-1 VIRGINIA database and encourage use of the service and Web site. These guidelines should also be used as a reminder to regularly review and update automated menus, verify that the menus are current, user-friendly, and provide useful assistance. These guidelines stress that, whenever possible, a “live” person should assist the caller.

2-1-1 VIRGINIA – Call Specialist Skills

- Able to answer basic questions about 2-1-1 VIRGINIA
- Speak at appropriate volume – loud enough to be heard, but not forced
- Speak clearly – have appropriate rate of speech and good pronunciation
- Speak in a tone that is pleasant, businesslike and uses positive language
- Interact with caller in a manner that demonstrates interest, understanding, and willingness to help
- Treat all callers with dignity and respect
- Understand a caller’s right to remain anonymous

Answering the Telephone

- Give salutation (e.g., “good morning”)
- State “2-1-1 VIRGINIA, how may I help you?”
- Solicit necessary information
- Encourage caller to call back if situation changes or if additional resources are needed
- Thank the person for calling

Personal Voicemail Greeting

- Name of the person to which the voicemail belongs and 2-1-1 VIRGINIA name
- Dates for which the greeting is valid
- As short and to the point as possible
- What key(s) caller can press on the telephone key pad for immediate assistance
- When caller can expect a return call (should be more specific than “as soon as possible.”)
- Name and extension of a colleague who can provide assistance
- Have enough capacity to store all the messages employees might receive

Group Voicemail Greeting

- Thank the caller for calling 2-1-1 VIRGINIA and let them know they are about to leave a message
- Instruct them on the specific information that should be left (name, number, etc.)
- Provide them with a standard response time (should be no longer than 24 hours)
- Provide alternative number they can dial for assistance (i.e., local crisis line, community service board hotline)

Customer Responsiveness

- Always try to answer telephone by third ring
- Limit hold function to no more than three minutes
- Use the hold button, rather than leaving the line open
- If you need to complete a task for the caller that will take several minutes, give the caller the choice of holding or receiving a call back

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Transferring Calls

- Let the caller know that you are going to transfer the call
- Give the caller the name and phone number of the person you are transferring
- Preview the transfer process for the caller
- Thank the caller for allowing you to transfer the call
- If possible, stay on the line while connecting to verify you are sending the caller to the correct person or that the receiver is available to take a call

Auto Attendant Menus

- If the 2-1-1 call comes into a separate line at the 2-1-1 center that is not used for other calls, **the** Auto Attendant greeting should clearly state that the caller has reached 2-1-1 VIRGINIA and should not list other program or agency names. If the call comes into a line that is shared with other programs of the 2-1-1 center, the Auto Attendant should clearly state that the caller has reached 2-1-1 VIRGINIA and should give other program or agency names following that statement
- Other programs and/or agency's can also be listed as transfer options
- Caller should always be instructed to dial 911 if they are experiencing an emergency that requires police or medical assistance and/or fire/emergency rescue
- Try to limit the number of choices offered in a single menu to five or fewer
- Tell caller how they can leave a message if they do not have time to wait for a live call specialist
- Give caller an option first, followed by instructions on what key to press to take action (e.g. "for information about X, press 3")
- Let the caller know what keys to press to repeat menus or replay information
- Make it familiar – have your script mirror normal person-to-person communication as much as possible
- Position emergency and the most commonly requested choices first on the menu